

STATE OF NORTH DAKOTA

Requisition
Training Scripts

REQUISITION TRAINING MANUAL – EXERCISES






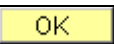
This system allows requisitions to be used internally and externally:

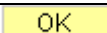







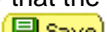
- Internally (within an agency)
 - Allows those agencies using paper requisitions within their agency to move to electronic.
- Externally
 - Allows routing of requisitions to external sources, such as
 - State Procurement
 - Information Technology
 - Facility Management






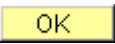

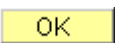

When creating the transactions in these exercises, please use the values provided in the exercise. The course instructor will review the answers to the exercises in class.




Requisitions – Scenario 1







Create Simple Requisition on Behalf of Another Requester








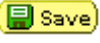



Steps	Directions	Comments
Step 1	Navigation: <i>Purchasing → Requisitions → Maintain Requisitions</i>	
Step 2	On the Add a New Value tab, enter Business Unit (BU) or verify correct BU defaults.	Click  to search BU (if needed).
Step 3	Click  .	
Step 4	Enter a requester. Requester: <input type="text"/> 	Click  to search Requesters (if needed).
Step 5	Click Header Defaults hyperlink.	
Step 6	For a specified vendor enter the vendor ID in the Vendor field. Enter appropriate default information such as Buyer , Ship To , Due Date , Category (listed in comments) , UOM , and Distributions (listed in comments) .	Click  to search Vendors (if needed). If UOM , Category and Ship To are left blank, values will default from Default page. They are required fields. Category – 91575 Distributions: Account – 602005 Oper Unit – 110 Fund Code – 001 DeptID – 1000 Class – 11030 Locations - 110000
Step 7	Click  to return to the Form Page .	
Step 8	Enter Variable Data	UOM and Category will default from


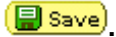
	Enter Description . Enter Req Qty . Enter Price . Click Refresh .	Item ID or from Defaults page. Verify and correct as needed. Ship To will default from Defaults page. Verify and correct as necessary.						
Step 9	Click the Schedule tab.							
Step 10	Verify default information such as Ship To, Due Date, Req Qty and Price .							
Step 11	Click the Distribution hyperlink							
Step 12	Enter required values that did not default. Enter Account Enter Fund Enter Class Funding Enter Dept	Verify defaulted values.						
Step 13	Click  .	Returns to Schedule tab						
Step 14	Click Forms Tab and  .							
Step 15	Budget Check Requisition by clicking  .	Note: The Budget Status will change from Not Checked (Budget Status: Not Chk'd) to Valid (Budget Status: Valid). Also, note that the Budget Check icon  is now grayed out. This is your indication that the Purchase Order has been budget checked.						
Step 16	Click  .	Req ID: _____						
Step 17	Approve Requisition Navigation: <i>Purchasing → Requisitions → Approve Amounts.</i>							
Step 18	Enter Business Unit and Requisition number in the Search Dialog page.	Note: If your requisition automatically displays, go to step 21. If your requisition does not display, follow steps 18 – 21.						
Step 19	Click  .							
Step 20	The search results will display, find your requisition, click it. Search Results View All First  1-2 of 2  Last <table><tr><th>Business Unit</th><th>Requisition ID</th></tr><tr><td>11000</td><td>0000000048</td></tr><tr><td>11000</td><td>0000000036</td></tr></table>	Business Unit	Requisition ID	11000	0000000048	11000	0000000036	
Business Unit	Requisition ID							
11000	0000000048							
11000	0000000036							
Step 21	Verify that the information is correct. Click  .	(Note the Status will change from “Initial” to “Complete”.)						

Requisitions – Scenario 2		
Create Requisition with Multiple Lines		
Steps	Directions	Comments
Step 1	Navigation: <i>Purchasing → Requisitions → Maintain Requisitions</i>	
Step 2	Under Add a New Value Tab, enter Business Unit (BU) or verify correct BU defaults. Click  .	Click  to search BU (if needed).
Step 3	Enter a requester. Requester: <input type="text"/> 	Click  to search Requesters (if needed).
Step 4	Under Form Tab, click Header Defaults hyperlink.	
Step 5	On Header Defaults Page , verify that the “Override” button is selected.	Override allows changes in the distributions. If you choose default the requisition is locked and you will not be able to change the distributions.
Step 6	Under Items Defaults section, enter the following: Buyer Ship To Due Date Category UOM	For each field, click on  to select appropriate selection.
Step 7	Under Distribution section, enter the following: Account – 602005 Oper Unit - 110 Fund Type – 001 DeptID – 1000 Class – 11030 Click  to return to the Form page.	For each field, click on  to select appropriate selection.
Step 8	On Form Page , enter correct Origin field .	The origin field is the origin of the requisition. It will be used for the routing of the approval. It will be the divisions within an agency.
Step 9	Click on Header Comments hyperlink. Click  to return to the Form	Click on  to select appropriate selection.

	page.	
Step 10	<p>Under Line Section, enter the following:</p> <p>Description</p> <p>Req Qty</p> <p>Click on the Refresh button on bottom of the page, this will bring in the defaults for the UOM, category and ship to.</p>	UOM, Category and Ship To should default from Header Defaults page.
Step 11	Click the Schedule Tab .	
Step 12	On the Schedule Page , verify Ship To and Due Date . Enter the unit price in the price field.	
Step 13	Click the Distribution hyperlink	
Step 14	<p>On the Distribution Information page, verify defaulted values. Enter required values that did not default from step 6 above.</p> <p>The required fields are:</p> <p>Account – 602005</p> <p>Operating Unit – 110</p> <p>Fund – 001</p> <p>DeptID – 1000</p> <p>Class – 11030</p>	
Step 15	Click  , to return to Schedule page.	
Step 16	Click Forms Tab and  .	
Step 17	Note Req Number _____	
Step 18	Click on the yellow plus sign to add additional row(s).	
Step 19	A screen labeled “Explorer user Prompt” will appear in the upper left corner. Enter the number 4 and click on OK.	
Step 20	<p>Under Line Section, complete the following for the additional four line items:</p> <p>Description</p> <p>Req Qty</p> <p>Price</p>	Click on  to select appropriate selection.
Step 21	Click on the Refresh button on bottom of	UOM, Category and Ship To should

	the page. This will bring in the defaults for the UOM, category and ship to.	default from Header Defaults page.
Step 22	Click the Schedule Tab.	
Step 23	On the blue “line” bar, click on “View all”. Verify Ship To and Due Date on each item. Click  .	
Step 24	Return to the Form tab by clicking on Form tab.	
Step 25	Click  to run Budget Checking. After Budget Checking is complete, click  .	Note: The Budget Status will change from Not Checked (Budget Status: Not Chk'd) to Valid (Budget Status: Valid). Also, note that the Budget Check icon  is now grayed out. This is your indication that the Purchase Order has been budget checked.
Step 26	To approve requisition use the following navigation: <i>Purchasing → Requisitions → Approve Amounts</i>	
Step 27	Enter Business Unit and Requisition number in the Search Dialog page. Click  .	Note: Your requisition will automatically display since you just entered it. If it does not display, follow steps 27 - 28.
Step 28	Click  to approve the requisition.	

Requisitions – Scenario 3		
Create Requisition by Copying From Another Requisition		
Steps	Directions	Comments
Step 1	Navigation: <i>Purchasing → Requisitions → Maintain Requisitions</i>	
Step 2	On the Add a New Value tab, enter Business Unit (BU) or verify correct BU defaults. Click  .	Click  to search BU (if needed).
Step 3	Enter a requester other than yourself. Requester: <input type="text"/> 	Click  to search Requesters (if needed).
Step 4	Select the Copy From hyperlink. Enter Requisition ID .	Click  to search for Requisition (if needed).
Step 5	Click  .	
Step 6	Enter Variable Data Enter Origin . Verify the copied Line Information . Make corrections as needed.	
Step 7	Click the Schedule tab.	
Step 8	Verify default information such as Ship To, Due Date, Req Qty and Price .	
Step 9	Click the Distribution hyperlink	
Step 10	Distribution Page Verify the copied Distribution Values . Make corrections as needed.	
Step 11	Click  .	Returns to Schedule tab
Step 12	Click Forms Tab and 	
Step 13	Budget Check Requisition by clicking 	Note: The Budget Status will change from Not Checked (Budget Status: Not Chk'd) to Valid (Budget Status: Valid). Also, note that the Budget Check icon  is now grayed out. This is your indication that the Purchase Order has been budget checked.
Step 14	Click  .	

Step 15	Approve Requisition Navigation: <i>Purchasing → Requisitions → Approve Amounts</i>	
Step 16	Enter Business Unit and Requisition number in the Search Dialog page.	Note: Your requisition should automatically display since you just entered it. If not, follow steps 16-18.
Step 17	Click  .	
Step 18	Click  .	(Note the Status change from “Initial” to “Complete”.)